Commonwealth of Virginia

Teleworking Guide to Best Practices

March 30, 2007

COTS Mobile Workforce Workgroup Members

The Mobile Workforce Workgroup began its work by developing a team charter which described the team's goals, objectives, and scope of work. The charter was reviewed by the full Council on Technology Services (COTS) membership and approved. The team reviewed input from numerous publications, individuals with specialized knowledge, attended conferences, and conducted extensive web research. The results of the team's efforts, research and deliberations are provided throughout this document.

Review Process

In addition to being developed and reviewed by each one of the workgroup team members, this document was also reviewed by selected employees within VITA and by the full COTS team. This report was also reviewed by Karen Jackson, Director of the Office for Telework Promotion and Broadband Assistance, the Department of Human Resource Management, Lem Stewart, CIO of the Commonwealth, and Jerry Simonoff, Director of the Information Technology Investments and Enterprise Solutions Directorate.

Table of Contents

TELEWORKING GUIDE TO BEST PRACTICES

Council on Technology Services   **Mobile Workforce Workgroup**

"Over 26 million people work from home at least one day a month... mobile work has become the standard way of doing business in many organizations."

EXECUTIVE SUMMARY

Our workforce is becoming increasingly mobile. Teleworking[1] is not new, but rather has become a standard way of doing business in many organizations. The strategic drivers for a mobile work program are well understood – reduction in commuter traffic, economic development in underserved regions, workforce management, reductions in facilities expenses, and emergency preparedness. Numerous organizations have demonstrated that the benefits of a successful mobile work program can be significant.

A recent survey conducted by The Dieringer Research Group for the International Telework Advisory Council (ITAC) gives significant insight into where people work. The survey asked respondents where they had worked during the past month and concluded that out of 135.4 million American workers:

- o 45.1 million worked from home,
- o 24.3 million worked at client's or customer's place of business,
- o 20.6 million in their car,
- o 16.3 million while on vacation,
- o 15.1 million at a park or outdoor location, and
- o 7.8 million while on a train or airplane

The same research revealed that over 26 million people work from home at least one day a month, and over 22 million at least once a week.

In "A Guide to Teleworking – The Real Facts on Teleworking and How it Can Work for You", the VIACK Corporation published the following compelling examples of benefits realized from telework:

- AT&T realizes approximately $150 million in annual savings by teleworking; $100 million through direct employee productivity, $35 million through reduced real estate costs and $15 million through enhanced employee retention. (*AT&T 2002-2003 Employee Telework Survey*)
- The Maryland Department of Transportation experienced a 27 percent increase in productivity when more than 100 employees opted to telework. (*The Telework Coalition*)
- Teleworker employees at JD Edwards are 20 to 25 percent more productive than office workers. (*Chicago Sun Times*)

---

[1] Although some organizations and publications like to differentiate the terms "Telework" and "Telecommuting", for the purposes of this document, they are synonymous and are used interchangeably.

- The U.S. Department of Treasury saved $100,000 per year in leased office space by allowing employees to telework on a regular basis. (*GovExec.com*)

Organizations with successful programs have generated a wide range of best practices and other resources that can be used to reduce the time required to implement a new program. It is readily apparent that telework continues to be on the rise in the U.S. and is bringing material benefits and value to both employer and employee. Many studies have found that employees who telework are more productive, that telework can cut corporate real estate costs significantly, that telework cuts absentee-related costs, and that very few teleworkers want to stop once they have started to telework. Businesses and government agencies that adopt telework programs see telework as an important recruitment and retention strategy, as well as a critical element of their continuity of operations plan.

The charter of the COTS Mobile Workforce Workgroup states:

> "The mission of the Mobile Workforce Workgroup is to provide information that will make it easier for state and local government managers to implement mobile workforce programs. Our purpose is to develop a white paper that documents best practices, particularly as they relate to the business rules, technology enablers, and approaches for measuring mobile workforce program performance."

This document presents the findings of the COTS Mobile Workforce Workgroup in three important areas:

> *Telework Best Practices* – The primary purpose of this workgroup was to document best practices prevalent in successful telework programs. Because of the inherent value of lessons learned from other programs, the best practices are included in the Executive Summary, immediately below.

> *Telework Resource Guide* – This section is a comprehensive guide to telework resources readily available for use in designing, developing, and implementing a new telework program. This resource guide includes a broad range of materials (web sites, handbooks, policies, etc.) and begins on page 35.

> *Recommendations for Promoting Telework in Virginia* - While not the central purpose of our work, a number of recommendations were surfaced during the creation of this document that would promote the usage of Telework in Virginia state government. The recommendations begin on page 37.

Throughout the document our findings are organized around what we found to be the three pillars of success for any telework program – appropriate **business rules, technology enablers**, and **program performance measurement**.

TELEWORK BEST PRACTICES

The COTS Mobile Workforce Workgroup researched successful telework programs to identify best practices. It is important to remember that there is no "standard" telework program. Organizations implement mobile work programs that they deem appropriate to address their business needs and goals, and consequently the success factors vary from program to program. The best practices below are those that were prevalent in many of the programs we researched, and are drawn directly from the sources listed throughout this document.

BUSINESS RULES

Spend the Right Amount of Time Designing the Right Program

- ✓ Ensure visible support from the top.
- ✓ Assemble a strong project team, including HR, IT, and Facilities.
- ✓ Appoint a Telework Coordinator - a constant and visible champion.
- ✓ Learn from other successful programs.
- ✓ Establish clear/written guidelines and policies.
- ✓ Once you've planned for what you can readily anticipate, move on to the pilot stage.

Identify the Roles Best Suited for Remote Work

- ✓ Identify those employees who, by virtue of their job role and performance, are eligible to telework and encourage them to do so.
- ✓ Denials of telework requests should be limited to business needs or performance.

Create Formal Telework Agreements

- ✓ A formal agreement should be in place between the teleworker and manager, including those required to telework in the case of a continuity of operations event.

Continuity of Operations Plan (COOP)

- ✓ Those employees identified as essential or critical in the case of a continuity of operations event should be required to "experience" teleworking by working remotely at least one day per month.

Provide Appropriate Training and Support Resources

- ✓ Both managers and teleworkers should participate in training and understand the telework policy and guidelines.

- ✓ Manager training must include managing remote work and measuring performance.
- ✓ Remote workers should have easy access to support resources, including policies, guidelines, FAQ's, Handbooks, etc.

Start With a Pilot

- ✓ Establish a pilot program that can be easily managed and evaluated.
- ✓ Broadly communicate benefits during the pilot.
- ✓ Modify the program based on what you learn from the pilot and expand after demonstrating the business case.

Communicate, Communicate, Communicate

- ✓ Clearly communicate the benefits and successes of teleworking to gain management support.
- ✓ Ensure ongoing interaction between managers and remote workers is sustained, and that open communication is maintained across all members of a workgroup.
- ✓ Managers and employees should maintain frequent contact with their Telework Coordinator to ensure the agency's policy and procedures are properly applied and to leverage available support resources.
- ✓ Promote a strong team culture and address the feeling of isolation that some remote workers will encounter.
- ✓ Allow members of a team to interact face-to-face before beginning remote work.

Manage by What Gets Done, Not by What You Can Observe

- ✓ Manage teleworkers the same as other employees – they are performing the same work, just at a different location.
- ✓ Performance standards for remote workers should be the same as performance standards for on-site employees – all must be held accountable for results produced.

TECHNOLOGY ENABLERS

Provide the Right Technology Tools <u>and</u> the Right Technology Support

- ✓ Identify the technology tools necessary to support the work being done. Not all remote workers will need all available technology tools to complete their assigned work, and some may not need anything more than a conventional telephone.
- ✓ For those who need it, provide a secure technology environment that allows remote workers to do their job just like when they are at the office. Consider tools like laptops, Virtual Private Networks (VPN), Broadband, Voice-over-Internet-Protocol (VOIP), BlackBerrys, corporate instant messaging, and collaboration tool suites.

    ✓ Provide the appropriate level of technology support to facilitate remote work, including extended help desk support and fast repair/replacement when needed.

PROGRAM MEASUREMENT

First Determine The Desired Business Outcomes…

    ✓ Define the agency's quantifiable goals and objectives of the remote work program before the program is implemented.

Then Identify the Appropriate Metrics to Measure Success

    ✓ Define the methods that will be used to determine the costs and benefits of teleworking based on the desired outcomes

    ✓ Consider the following metrics for measuring the results of the program:

- Adequacy of training, supervisor support, and technology support
- Productivity
- Operating costs, including sick leave taken, worker's compensation costs, office space needs, transit subsidy expenses
- Employee morale
- Employee recruitment and retention
- Community concerns like traffic congestion and mass transit

"Virginia's governmental telework initiatives revolve around five major themes."

BUSINESS DRIVERS AND CHALLENGES

Organizations develop telework initiatives for a variety of reasons and with different results. While the overall rationale may be similar, the business drivers for telework in the private sector may typically focus on fewer aspects than public sector programs which often address multiple public policy issues (e.g., transportation and economic development issues).

Telework is a non-traditional method for conducting an organization's business. As such, it poses a number of challenges and barriers to its successful evaluation and adoption in an agency's operations. Telework is a different way of working from the employee's perspective as well, presenting personal obstacles that must be addressed in successful programs.

BUSINESS DRIVERS

Virginia's governmental telework initiatives revolve around five major themes:

1. Reduction in Commuter Traffic

Growing traffic, particularly in rapidly developing urban and suburban regions of the Commonwealth, is creating pressures on roads (and the need for additional roads), increasing commuting times, increasing pollution problems, and straining energy resources. By increasing the use of telework in federal, state and local government and providing incentives and encouragement for similar programs in the private sector, the Commonwealth can begin to address the issues of road needs, environmental problems associated with automobile pollution, and growing demand and cost of gasoline.

2. Economic Development in Underserved Regions of the Commonwealth

Advancements in communications and computing technologies have created opportunities for jobs and businesses in economically underserved areas in Virginia. Telework can provide new opportunities for residents of these areas as well as providing government and business access to segments of the labor market heretofore not available.

3. Workforce Management

Workforce management issues are typically primary drivers of telework programs. Organizations need to find new tools to assist with the recruitment and retention of staff, improve employee morale and job satisfaction, and tap new sources of labor. These are critical issues for State government which faces challenges with competitive compensation, a workforce that is nearing retirement age and the need to keep organizational knowledge and expertise. Telework can be a very good mechanism to increase employee satisfaction and lead to improvements in recruitment and retention of

a skilled and motivated workforce. Telework in combination with part-time employment can also be used to help retain organizational knowledge and expertise when employees wish to retire from their full-time positions. All of these factors frequently are shown to improve employee and organizational productivity.

4. Reduction in Facilities Expenses

A principle business driver for telework initiatives in the private sector is often the desire to reduce facilities and infrastructure costs. While this may not be the primary motivation in governmental telework programs, broad implementation and careful management of these activities can lead to significant reductions in facilities costs through lower use of leased space, reduced need for State-owned space and attendant infrastructure costs (e.g., telecommunications networks).

5. Emergency Preparedness and Business Continuity

An important component of an organization's emergency preparedness and continuity of operations plans is providing alternate locations for employees to do their work. Telework programs provide the model for having employees work in off-site locations. Work and communications logistics, operational procedures and workflow must be detailed and functional for telework programs. These procedures are easily adaptable to emergency preparedness/continuity of operations plans and procedures.

CHALLENGES AND BARRIERS

Highlighted below are several of the major challenges and barriers that organizations and workers have faced when implementing telework programs. Identifying the potential barriers that could impact a telework program and developing strategies to address those issues are keys to a successful implementation of telework.

1. Organizational and Management Challenges

Organizational executives and managers are keenly interested in the smooth and efficient operation of their activities. Often, telework programs are seen as disruptive to traditional operational models as well as requiring additional activities and costs (such as training or IT support for remote workers). Typical challenges that organizations must face and resolve when evaluating and implementing telework programs include:

- Management resistance, particularly among middle managers and direct supervisors. Cultural resistance against new models for supervising staff is typically the top challenge to organizations implementing telework programs. Top level executive sponsorship and commitment is necessary to overcome this resistance.

- Program management. Successful telework programs have well-defined and robust management processes as opposed to an ad hoc approach. This includes providing funding to support the program, identifying a program

manager/coordinator, creating a telework policy, and providing appropriate training.

- Protection of proprietary and sensitive information and assets. IT security is a major and growing concern for organizations of all types. Remote workers pose challenges for ensuring the proper protection of the organization's data and technology assets. Technologies and techniques for providing secure remote connections to an agency's IT infrastructure are different than from within their network.

- Technology support for remote workers/locations. Organizations have taken different approaches to technology support for remote workers from requiring employees to use personal equipment and resources to fully supporting equipment and telecommunications needs (e.g., acquisition, set-up, break/fix, etc.).

- Funding. Although telework programs are likely to reduce an organization's expenses in the long run (due to reduced facilities needs, lower employee turnover, etc.), sufficient start up funds are essential to a successful implementation for program staff, training, technology needs, etc.

- Training. Since telework programs involve significant changes within the organization and how activities are done, both employees and managers should receive training on the agency's

policies, expectations and methods for remote working and managing teleworkers.

- Legal considerations. Organizations also need to evaluate potential legal issues and design telework programs to meet federal and state laws and regulations. Some areas to consider include workplace safety and liability, records management, FOIA requirements, and employee income taxation (if telecommuting across state lines).

- Fair Labor Standards Act (FLSA): Though managers are most often concerned about having assurances that persons are working as much as they are supposed to, a big liability issue arises when a non-exempt person works extra hours and creates an overtime liability problem for the agency.

- Operations. One of the biggest obstacles for supervisors of teleworkers is the issue of control and how to manage the daily operations of their units. Because monitoring performance is more difficult for those working at home, managers may not provide clear expectations or performance goals or give good performance reviews and promotions when warranted. As with all employees, effective performance monitoring of teleworkers requires that supervisors provide clear expectations and/or performance goals. Supervisors who are not accustomed to "managing by results" may need to adapt their managerial practices to ensure that all employees receive good performance reviews and promotions when warranted.

- Determining job and employee suitability for telework. Not all jobs are conducive to telework. Organizations need to carefully evaluate which positions are appropriate for this type of work. In addition, not all employees are suitable for telework even though their jobs may be. Organizations need to establish clear criteria (e.g., focused, flexible, highly organized) to assess employee suitability for telework.

2. Employee Perspective

Working remotely from an office environment presents challenges for employees as well. Away from immediate supervision, teleworkers must establish their own work environments and methods in their homes or alternate work sites. Perhaps the most challenging aspects of telework are the interpersonal and social components of working with others in a traditional environment.

- Managing work/life balance. Since most telework is in the employee's home, it is often difficult for the teleworker to strike the appropriate balance between their work and personal lives. This can manifest itself

by getting inappropriately involved in personal activities during normal work time or being "on the job" at all hours of the day and night. Clearly defined organizational expectations and training can help employees strike the proper balance.

- Social aspects/need for interpersonal interactions. Some teleworkers complain of social isolation, so it is important for the organization to maintain some type of social contact with these employees, both supervisors and colleagues. Often, social isolation can be mitigated by a schedule that has the employee working periodically in their regular office.

- Professional development and advancement. Due to their physical isolation, teleworkers may have fewer opportunities for training and professional development or may not be considered for career advancement or promotions. This challenge can be alleviated by good communication between the supervisor and the employee, effective performance monitoring on the part of the supervisor, and reducing physical isolation by periodically working from the regular office, even if for only part of the day.

*"'Telework' and 'Telecommuting'
…are synonymous."*

MOBILE WORKFORCE TYPES (DEFINITIONS)

In today's literature, there are many different definitions and interpretations of the various words associated with teleworking and telecommuting. Following are ones the workgroup developed to for the purposes of this document.

TELEWORK Telework is a formal work arrangement where job duties are performed at an Alternate Worksite for a material portion of the workweek on a regular and recurring basis, reducing or eliminating the employee's commute. A formal agreement must exist between employee and employer that details the terms and conditions of the arrangement. Teleworking as addressed in this document does not include Situational Telework or Mobile Working, and is synonymous with telecommuting.

MOBILE WORK Mobile Work is a formal work arrangement where work is not tied to a single physical location but instead requires the worker to travel to multiple locations for a material portion of the workweek. A formal Mobile Work agreement must exist between employee and employer that details the terms and conditions of the arrangement. A mobile worker can also be a Teleworker if they utilize an Alternate Worksite rather than a central office location.

ALTERNATE WORKSITE Work locations outside of the customary physical business site. Alternate Worksites may include the employee's home, a telework center, a client site, a field site, etc…

SITUATIONAL TELEWORK Situational Telework is work that while conducted at an Alternate Worksite is unscheduled, project oriented, non-recurring, and/or does not occur on a regular basis. A formal agreement is normally not required.

"Studies have found that employees who telework are more productive, that telework can cut corporate real estate costs significantly, and that telework cuts absentee-related costs."

TELEWORKING TODAY - HERE AND AROUND THE WORLD

There are no "standard" telework implementations within state government, the Federal government, or the private sector; nor are there standard comparable statistics that measure extent of implementation. Implementations are driven by the unique business need of each organization, so implementation statistics must be considered in context with other adoption drivers, issues, and desired business outcomes.

Many studies have found that employees who telework are more productive, that telework can cut corporate real estate costs significantly, and that telework cuts absentee-related costs. In fact, very few teleworkers want to stop once they have started to telework. Businesses and government agencies that adopt telework programs see telework as a recruitment and retention strategy, and often fund the technology needed to provide critical business applications to the teleworker.

Key findings from telework studies and reports indicate that telework is on the rise in the US, bringing benefits and value to both employer and employee.

- A 2004 American Interactive Consumer Survey conducted by The Dieringer Research Group indicated that
  o The number of employed Americans who performed any kind of work from home, with a frequency range from as little as one day a year to full time, grew from 41.3 million in 2003 to 44.4 million in 2004, a **7.5%** growth rate.
  o Teleworkers who worked at home during business hours at least one day per month increased in the past year from 23.5 million to 24.1 million, a **2.6**% increase.
  o In 2003 there were 4.4 million teleworkers working at home with broadband. By 2004 the number soared to 8.1 million, an **84%** increase.
- In a compensation survey of 1,400 CFOs conducted by Robert Half International, 46% said telecommuting is second only to salary as the best way to attract top talent. However, 33% said telecommuting was the top draw.
- According to Nortel (a multinational telecommunications equipment manufacturer headquartered in Toronto, Canada) the entire cost to outfit and equip an employee to telework is made up in the first year if only 3.5 days away from work can be saved, i.e. time lost due to a doctor's appointment, ill child, employee illness, other personal situation that requires time away from an office. That number drops to 1.5 days in subsequent years.

TELEWORK IN VIRGINIA STATE AGENCIES

Legislation was enacted in 2001 by the Virginia General Assembly which states in part:

(§ 2.2-203.1) "The Secretary [of Administration], in cooperation with the Secretary of Technology and in consultation with the Council on Technology Services, shall establish a comprehensive statewide telecommuting and alternative work schedule policy under which eligible employees of state agencies, as determined by state agencies, may telecommute or participate in alternative work schedules, and the Secretary shall periodically update such policy as necessary."

In addition, the General Assembly enacted the following code the same year:

(§ 2.2-2817.1) "A. ...the head of each state agency shall establish a telecommuting and alternative work policy under which eligible employees of such agency may telecommute, participate in alternative work schedules, or both, to the maximum extent possible without diminished employee performance or service delivery. The policy shall identify types of employees eligible for telecommuting and alternative work schedules, the broad categories of positions determined to be ineligible for telecommuting and the justification therefor, any benefits of telecommuting including the use of alternate work locations that are separate from the

agency's central workplace, and any benefits of using alternative work schedules. The policy shall be updated periodically as necessary."

In 2002, the Department of Human Resource Management (DHRM) issued a statewide telecommuting policy (DHRM Policy 1.61[2]) along with a sample telecommuting work agreement. Agencies were encouraged to create their own policies modeled after the one published by DHRM. The Virginia Information Technologies Agency (VITA), through its predecessor agency DIT, issued telework policies and forms that same year. The policies from these agencies model best practices found elsewhere in the public and private sectors and may be used as templates for creating an agency specific telework policy. Consult the Resource Guide section of this document for additional information.

This Guide helps agency managers to understand why telecommuting is important to the Commonwealth and how to establish an effective telecommuting program in order to fulfill the requirements of the Code of Virginia.

On September 12, 2006, Governor Tim Kaine signed an Executive Order creating the Office of Telework Promotion and Broadband Assistance, charged with encouraging public and private employees to telework. At the time, it was estimated that only one to two percent of state employees were teleworking.

---

[2] See link in Resource Guide p. Resource Guide35

According to a September 30, 2004 report released by Virginia's Department of Human Resources Management (DHRM), state agencies face a number of challenges in attracting and retaining a qualified workforce, yet only 15 agencies reported allowing employees to telecommute as a staffing strategy. Some departments of note that have active telework programs include the Virginia Information Technologies Agency, the Department of Human Resource Management, the Department of Taxation, and the Department of Health Professions among others.

A 2006 survey of agency human resource directors conducted by DHRM indicated that 4,617 positions across the commonwealth are currently telework-eligible, with 2,712 commonwealth employees actively teleworking. Additional, ongoing collection of statistics is needed to determine the extent and growth of telework in Virginia.

TELEWORK IN THE FEDERAL GOVERNMENT

Telework is on the rise in the Federal government, spurred on by federal legislation which requires agencies offer telework opportunities to their employees. CDW, a major technology supplier, released a comprehensive report on telework titled the *"2006 CDW-G Federal Telework Report"*. Key findings in this report that surveyed 542 Federal employees and 235 Federal IT professionals in the Washington, DC metro area include:

> *"Ninety two percent of Federal employees who telework do so from home and over half use a personal (not office-issued) computer."*

- 41 percent of Federal employees surveyed indicate that they telework, up from 19 percent in 2005, with 43 percent of Federal employees reporting that they started teleworking in the last year.
- 28 percent of Federal IT professionals reported providing support to teleworkers, up from five percent in 2006.
- Of all of Federal employees who telework, 92 percent do so from home, nearly half use a broadband connection and over half use a personal (not office-issued) computer.

The CDW-G report concluded that federal teleworkers are more likely to be able to work during an office closure and are more satisfied with their current jobs. Implementing the Federal Information Security Management Act (FISMA) continues to be a challenge to Federal IT professionals seeking to provide technology solutions for Federal teleworkers.

The Office of Personnel Management (OPM) has conducted annual telework surveys of Federal agencies since 2001. Their most recent report is from the 2004 survey that collected responses from 82 Federal agencies

representing more than 1.7 million Federal workers. The findings of the OPM survey include:

- The number of Federal workers eligible to telework continues to increase, with a 37 percent increase from 2003 to 2004.
- 85 percent of the agencies responding to the survey had a telework policy in place.
- 45 percent of the agencies either provided or shared in the cost of telework equipment.
- 66 percent of the agencies required a minimum performance rating for teleworkers, and 52 percent excluded employees with past disciplinary problems from being eligible.
- 63 percent of the agencies allowed employees to telework while dealing with health problems.
- 65 percent of the agencies used telework in conjunction with alternate work schedules, and 55 percent

required workers to adhere to agency working hours.
- 43 percent of the agencies had incorporated telework into their COOP plans, with 46 percent considering doing so.

Telework presents challenges.

- 53 percent of Federal IT professionals responding to the CDW survey reported that security is the primary IT challenge associated with telework
- Of the agencies responding to the OPM survey:
  - 55 percent reported that telework presented office coverage challenges
  - 44 percent reported data security challenges
  - 51 percent reported that the nature of agency work was a barrier to telework

TELEWORK IN THE PRIVATE SECTOR

In March, 2006 the Telework Coalition, a non-profit membership organization dedicated to promoting virtual, mobile, and distributed work, released a benchmarking study on telework practices in public and private sector organizations. The 13 organizations studied had their telework programs in place for three to 20 years. They represented more than 77,000 teleworkers and 60,000 additional mobile workers.

The Coalition study found that telework programs shared common practices and had changed over time in the areas of program development and administration. The coalition concluded that among those organizations with well established telework programs, "telework has evolved into a mainstream way of working."

In 2004, AT&T studied "Remote Working" by conducting a global survey of 250 senior

executives. The study concluded that, among the executives:

- More were providing more flexible working arrangements for employees than they had the year before.
- 81 percent viewed remote access to the corporate network as a critical or important goal.
- There was a significant rise in the adoption of technology such as VoIP and broadband to support remote work.
- Regular staff/manager communication is critical to success.
- At least one-third of office space costs can be cut through remote working.
- Productivity gains can be substantial.

TechRepublic[3] released a report on the mobile workforce in February 2006. The report, a study of over 370 IT and business professionals, studied business applications that support telework and challenges faced in enabling workforce mobility.

TechRepublic reported that:

- Almost 20 percent of the respondents indicated that all of the business applications in their offices were remotely accessible, while over 20 percent reported that the majority of applications were remotely accessible.
- Personal information management applications (such as e-mail, text

messaging and calendars) were the most highly provided applications, with nearly 90 percent of respondents providing them to remote workers; this is followed by Intranet access, provided by almost 70 percent of respondents.

- Of those applications not yet deployed to mobile workers, Intranet access and Field service/Data entry and collection are highest among those targeted for implementation within the next year.
- Respondents rated "Increased worker productivity and efficiency" as the most significant issue in making the business case for extending applications remotely.
- Security concerns were rated the most significant technical problem to mobile data and application deployment.

"Telework has evolved into a mainstream way of working."

---

[3] TechRepublic is member organization and part of the CNET Network family of online media technology companies. They can be found at techrepublic.com.com.

"The workgroup identified five award winning programs."

AWARD WINNING PROGRAMS

The workgroup identified a number of Award Winning Programs that could be held up as examples of programs which have been recognized as standing out or making a significant contribution to the practice of teleworking. In all cases we attempted to identify the business rules, the technology enablers, and program performance metrics. Five programs were identified:

- State of Arizona Telework Program
- National Wildlife Federation (NWF)
- Treasury Inspector General for Tax Administration (TIGTA)
- U.S. Postal Service Office of Inspector General (USPS OIG)
- U.S. Patent and Trademark Office (USPTO)

STATE OF ARIZONA

The State of Arizona, in a partnership with AT&T, established a pilot telework program in 1989, primarily for travel reduction purposes. The program was formally established by Executive Order in 1993. In 1996, all state agencies were mandated to implement the program, with the goal or having 15% of employees in Maricopa County actively telecommuting. Having achieved the 15% goal in 2002, the goal was reestablished at 20% of employees actively telecommuting. In 1993, Arizona joined with the states of Oregon and Washington (later joined by California and Texas) to establish The Telework Collaborative with the purpose of developing telecommuting materials and tools. Many informative and beneficial documents and insights are available on the State of Arizona Telework Program website: http://www.teleworkarizona.com/. This excellent program won the Telework

Exchange Tele-Vision award in 2006 for *Excellence in State Program Leadership.*

The following best practices were identified from materials on the State of Arizona Telework Program website:

Business Rules

- Define the qualities of best telecommuters, with a Self-Assessment survey.
- Establish telecommuting program policies to address administrative concerns in personnel, risk management and legal areas.
- Establish formal telecommuter/supervisor training and Telecommuting agreements.
- Implement the practice of 'management by results'.
- Define the issues addressed by the telecommuting program.
- Define the purposes and outcomes of the telecommuting program.

- Create a Practical Guide for Working at Home, with sections on Questions and Answers for State employees, Questions and Answers for State Supervisors, and How We Answer Management Concerns.
- Establish training programs for supervisors and employees. Two specific courses are: 'Introduction to Telework' and 'The Keys to Telecommuting Success'.
- Encourage employees and managers to research and consider telecommuting.
- Define methods to determine costs and benefits of telecommuting.
- Evaluate the impact of telecommute program on employees, management, legislators and the general public.
- Evaluate the program and make recommended changes based on those evaluations.
- The State of Arizona created a Handbook for implementing telecommuting within a state agency, defining the need to create a Telecommuting Coordinator function within the agency. 'Agency Coordinator actively promotes telecommuting within the agency and keeps track of formal telecommuters.'
- Establish a pilot program within the agency, and expand the program as warranted. The trial can last from 6-12 months. 'A well thought-out telework trial will address the initial concerns of

managers and supervisors, demonstrate the viability of the organizations "business case," and recommend future actions to expand telework and maximize the benefits.'
- Communicate with everyone during the trial, and let them know what is occurring and changing. 'Hold focus groups of both supervisors and teleworkers. Encourage teleworkers to share with their working groups about the benefits they are experiencing. Publish personal testimonials and creative solutions to problems that may arise during the trial.'

Technology Enablers

- The section 'To Start a Program' under the 'Telework Materials' heading is particularly helpful in defining the steps to be taken in assuring a successful program. It contains a 'Sample Trial Action Plan' and provides many sample documents which need to be considered and reviewed.

Program Measurement

- Written surveys, focus groups and individual interviews are used to evaluate the telework trial and identify what can be done to improve the program.
- The trial program begins and ends with a written survey

NATIONAL WILDLIFE FEDERATION (NWF)

The National Wildlife Federation (http://www.nwf.org) is a conservation organization responsible for the protection of wildlife. The NWF developed their telework program with the assistance of two grants from the Telework!VA program (www.teleworkva.org) and has been the recipient of a number of awards, including:

> 2005 Commuter Connections Employer Recognition Award from the Metropolitan Council of Governments (http://www.mwcog.org/commuter/awards2005PROGRAM.pdf)

According to the Metropolitan Council of Governments and Commuter Connections (http://www.mwcog.org/commuter/Telework%20CaseStudy_NWF%20081506.pdf) NWF's telework program was launched because it was consistent with the organization's mission as a conservation organization to reduce traffic and as a way to attract and retain employees by helping achieve work-life balance. After only five

"After only five years, over 30 percent of the organization's employees telework."

years, over 30 percent of the organization's employees telework.

In the Commuter Connections Award announcement, NWF cites commitment from the top down as essential to success. In addition, training of teleworkers and their managers along with the appropriate investment in technology tools were critical. NWF indicates telework has been budget neutral, but has allowed them to attract and retain top talent.

The following success tips were identified by NWF in the Commuter Connections Case Study:

- "Have support from the top.
- Do your homework. Look at successful programs. See what others are doing. You don't have to reinvent the wheel.
- Assemble a strong development and implementation team, which should include the human resources and information technology department. Make sure the technical infrastructure is there. People have to be able to do their job at home just like at their desk."

TREASURY INSPECTOR GENERAL FOR TAX ADMINISTRATION (TIGTA)

The Treasury Inspector General for Tax Administration (http://www.treas.gov/tigta/index.shtml) was established in January 1999 to provide independent oversight of the Internal Revenue Service activities.

The TIGTA telework program has been the recipient of a number of awards, including:

> *"Nearly half of the staff works remotely two or more days each week."*

2003 Commuter Connections Employer Recognition Award from the Metropolitan Council of Governments (http://www.mwcog.org/commuter/winners03.pdf)

2006 Telework Exchange Tele-Vision Award for Excellence in Telework Leadership (http://www.teleworkexchange.com/awards.asp)

According to a Case Study available on the Commuter Connections Web Site

(http://www.mwcog.org/commuter/Telework%20Case%20Studies_072706TIGTA.pdf) TIGTA's telework program was envisioned as a way "to make TIGTA a better place to work and to position the agency as an employer-of-choice." Just six years after introduction as a pilot program, 90 percent of TIGTA employees now participate in the program, with nearly half of the staff working remotely two or more days each week.

TIGTA officials cite their training program for managers as an important element in their success. Managers undergo a three-day training program focused on issues like how to deal with employees, how to deal with conduct and performance issues, and how to work effectively in virtual teams. The training stresses managing deliverables rather than managing employees.

TIGTA credits their telework program for aiding in employee retention, as an important recruitment tool, and as a way to reduce traditional office space.

The following success tips were identified by TIGTA in Commuter Connections Case Study:

- "Put a policy in place and then do it. Start with a formal pilot, and have a policy for it.
- Based on the pilot results, monitor everything, make your changes, and implement the program.
- Communication is a big part of the program; employees need to communicate with managers and vice versa.
- Training is also very important."

U.S. POSTAL SERVICE OFFICE OF INSPECTOR GENERAL (USPS OIG)

The U.S. Postal Service Office of Inspector General (http://www.uspsoig.gov) is responsible for preventing, detecting, and reporting fraud, waste and program abuse, and promoting efficiency in the operations of the Postal Service. The USPS OIG telework program has been the recipient of a number of awards, including:

> 2006 Commuter Connections Employer Recognition Award from the Metropolitan Council of Governments (http://www.mwcog.org/commuter/Employerawardsprogram2006.pdf)

According to Commuter Connections, USPS OIG adopted their telework program in 2001, and followed with a broader policy change called Smart Workplace in 2005 to promote collaboration, planning and innovation. Smart Workplace is reported to allow optimal performance of OIG staff based on a fundamental change in management style, where project deliverables, not people's behavior, are managed. All employees participate in Smart Workplace, with the majority working remotely as often as three times per week.

The following policies are integral in the USPS OIG Smart Workplace program:

- "Smart Workplace applies to all employees and is immediately available to any new employee.
- Employers are responsible for developing project plans for tasks assigned by managers.
- Managers and the employees develop internal performance expectations.
- All employees receive laptop computers, remote access and phone cards. Managers also receive wireless communication devices."

U.S. PATENT AND TRADEMARK OFFICE (USPTO)

The U.S. Patent and Trademark Office (http://www.uspto.gov) is an agency of the United States Department of Commerce. USPTO administers patent and trademark laws protecting intellectual property and rewarding individual effort USPTO has been the recipient of a number of telework-related awards, including the following:

2001 Commuter Connections Employee Recognition Telework Award from the Metropolitan Council of Governments (http://www.mwcog.org/commuter/winners01.pdf)

2003 Best Organization for Teleworkers Award, sponsored by the Mid-Atlantic Telework Advisory Council (MATAC)

2004 Telework in the Federal Government Leadership Award, presented during the Telework in Federal Government Conference

2006 Telework Exchange Tele-Vision Award - Telework Program with the Maximum Impact on Government (http://www.teleworkexchange.com/awards.asp)

The USPTO's telework program began in 1997 as a small pilot for 18 trademark examining attorneys. The agency wanted to provide employees a better quality of life, including more time at home and less time in traffic, while the recognizing benefits from higher productivity and reduced costs. In March 2003, trademark examining attorneys working from home

gave up individual offices at USPTO and began to share small banks of offices, allowing the agency to give up three floors of office space, saving nearly $1.5 million in rent annually. By 2006, 309 out of 379 attorneys were telecommuting, most for the majority of the workweek.

The MATAC recognized the USPTO for the following best practices:

- Recognizing that challenging work and a good work environment lead to satisfied employees who are more productive and more likely to stay with the agency, translating into lower operating costs
- Offering a family-friendly work environment including telework
- Believing that employees are the key to the success of the agency

"Fairfax County was the first jurisdiction to reach the regional to have 20 percent of the eligible workforce teleworking one day per week or more by the end of 2005."

CASE STUDIES

The following presentations, articles and websites highlight the telework best practices being utilized at various organizations:

- o State and County Government
  - Fairfax County, Virginia
  - State of Maryland
- o Federal Government
  - A Guide to Telework in the Federal Government
- o Private Sector
  - Jet Blue
  - S C Johnson
  - AT&T
  - IBM
  - VIACK Corporation

STATE AND COUNTY GOVERNMENT

Fairfax County, Virginia

Fairfax began a telework program for government employees in 1995. The program, called **Fairfax Teleworks**, has been growing ever since.

The county defines telework as allowing employees to work from a home-based office or local work center during normal work hours at least one day a month, instead of commuting.

Currently, more than 1,000 county employees telework an average of one day a month. Fairfax County was the first jurisdiction to reach — and then exceed — the regional goal set by the Metropolitan Washington Council of Governments to have 20 percent of the eligible workforce (approximately 5000 employees)

teleworking one day per week or more by the end of 2005. This successful program was also used by the Telework Coalition in compiling its 2006 Telework Benchmarking Study.

In November 2002, the county published a professional, bound document titled "Guide to Telework in Fairfax County Government". This polished guide provides the teleworker and telework manager with the information they need to successfully telework in Fairfax County. It is also intended to be a resource to other public or private entities desiring to establish their own telework programs. For additional information visit there website at: http://www.fairfaxcounty.gov/telework/

State of Maryland

The state of Maryland has embraced teleworking wholeheartedly. They fashioned their telework program and guidelines after the federal government. Maryland's state law requires each agency in the Executive Branch to meet a participation goal, allowing 10% of all "eligible employees" to telework. Eligible employees are those employees in jobs most suited for teleworking (e.g. data analysis, writing reports, and making telephone calls). The Telework Steering Committee, comprised of representatives from various agencies, determined the number of eligible employees in each agency and then determined the participation goal of each agency.

Information outlined below comes from the State of Maryland Teleworker's Manual. The manual was developed by the Maryland Department of Budget and Management and the Office of Personnel Services and Benefits.

Beneficial and informative data may be found in the State of Maryland's Telework Manual: http://www.bsu-telecommute.com/resources

Business Rules

- Maryland's definition of a teleworker is a person who, for at least four days a month, works at home, at a satellite office, or at a Telework Center to produce an agreed upon work product.
- Before allowing an employee to telework, the employee's supervisor

must review with the employee three documents; 1) the Agency Telework Agreement, 2) the Remote Workplace Self-Certification Checklist, and 3) the Teleworker Work Plan.

- The employee is required to complete and return the Agency Teleworking Agreement and the Remote Workplace Self-Certification Checklist before beginning to telework.
- Before each day at a remote worksite, the supervisor and the teleworker should complete a Teleworker Work Plan, identifying the assignments to be completed while the employee is teleworking.
- The Maryland manual made it very clear that teleworking was not a substitute for child or dependent care.
- The policy allowed for a supervisor to make on-site visits to the teleworker's remote workplace for the purposes of determining that the site is safe and free from hazards and to maintain, repair, inspect or retrieve agency-owned equipment. The policy mandated that the supervisor should provide the employee with at least 24 hours notice before inspection and that inspections should only take place during normal work hours.
- The Maryland manual contained some helpful information for "assessing the decision to telework".
- This section included data for the teleworker, the supervisor and the co-workers.
- The manual also included a comprehensive FAQ section.

Technology Enablers

- Agencies are permitted to provide equipment, software and supplies to the teleworker, but the documentation was unclear as to how decisions were made to determine if an employee would be provided these tools.

Program Measurement

- A representative from the Maryland Department of Budget and Management verbally reported that out of 25 Maryland state agencies; about half of the agencies participate in the telework program.

FEDERAL GOVERNMENT

A Guide to Telework in the Federal Government

The U.S. Office of Personnel Management (OPM -http://www.opm.gov) has taken a lead role in promoting telework among the federal government workforce. OPM and the General Services Administration (GSA) work directly with telework coordinators in each agency to provide guidance and assistance.

The following best practices were identified by OPM in this report:

Business Rules

- Managers and employees should maintain frequent contact with their telework coordinator to ensure the agency's policy and procedures are properly applied and to ensure the full range of support resources are available.
- Managers and employees should participate in training and be familiar with the agency's policy to ensure compliance with its requirements,

including protection of sensitive "hard-copy" files and documents.
- Telework should be implemented strategically, taking into account the needs and work of the group, rather than granting or denying telework requests one by one.
- The teleworker and his or her manager should enter into a written agreement for every type of telework, whether the employee teleworks regularly or not. Individuals who will be required to telework in the case of a Continuity of Operations event should also have a telework agreement in place.
- Denials of telework requests should be based on business needs or performance, not on personal reasons.
- Performance standards for off-site employees should be the same as performance standards for on-site employees, and should be clearly addressed in the telework agreement. Employees must be held accountable for the results they produce.

- Expectations should be communicated in advance, including how the manager will know when the employee is present, how the manager will know work is being accomplished, what equipment is being provided and how will it be supported, what expectations are for availability and the amount of notice given for reporting to the official worksite, etc.
- Methods should be in place to maintain open communication across the members of the workgroup.
- Avoid distributing work and rewarding performance based on "availability" as measured by physical presence.
- Manage teleworkers the same as other employees – they are not performing different work, just at a different location. Emphasize equality between teleworkers and non-teleworkers.
- Judge employee performance by results not by observation. Focus on results, such as accomplishments, products, or services provided. Performance plans should include standards that are measurable, observable, and at least verifiable. Quantity, quality, timeliness, and cost-effectiveness should be measured.

This paper is available on the Interagency Telework Site at http://www.opm.gov/pandemic/agency2a-guide.pdf .

> *"A 2005 survey found that 79 of the top 100 companies allow their employees to telecommute at least 20% of the time."*

EXAMPLES FROM THE PRIVATE SECTOR

Fortune magazine's 2005 survey of the Best Companies to Work For found that 79 of the top 100 companies allow their employees to telecommute at least 20% of the time—a 439% increase from 1999. The drivers behind this dramatic increase are varied but revolve around the need for these private organizations to be more competitive:

- Competition for the best workers has led companies to telecommuting programs to aid in recruiting and retention, increase employee satisfaction and productivity, and reduce turnover.
- Cost pressures have forced organizations to look at innovative ways of reducing expenses to be more competitive and profitable. Telecommuting programs can result in significant savings in facilities costs as employees work from home rather than a company-provided office. In addition, lower staff turnover from these programs translated into lower personnel costs from recruitment, training and lower absenteeism.
- Centralization of facilities and employees is a drawback to business continuity when an emergency arises. Organizations that have well-developed telework procedures and programs can maintain a high level of business operations when natural or man-made disasters occur.

Jet Blue

Jet Blue's reservation center is often pointed to as the prototypical example of telework for a call center operation. Eighty percent of Jet Blue's reservation agents work from home. The program has allowed the company to avoid or reduce facility expenses, increase productivity, increase employee satisfaction and reduce turnover. Key components of the program include:

- The ability to quickly match staff resources to call volume through real-time approval of overtime for high volume periods and voluntary time-off for low volume periods.
- Special system tools to allow managers to monitor agents, provide coaching, and improve customer relations skills.

- A standard set of computer security tools to protect company assets and information.
- A six-week "nesting" period in Jet Blue's support center before the agents are allowed to work from home.
- Central office training for agents every three months. Jet Blue computers used at the home location are serviced and patched during these training periods.

Jet Blue's reservation agents are required to live within 40 miles of the company's Salt Lake City headquarters in the event that the employee's home system goes down or other staffing needs. For more information about Jet Blue, visit their website at: http://www.jetblue.com.

S C Johnson

S C Johnson, a consumer products company, includes telework in an array of employee programs to aid in recruitment and retention, improve employee satisfaction and increase productivity. Over half of S C Johnson's employees telecommute at least one day per week. The company is perennially listed among the top employee- and retiree-friendly organizations. Its telecommuting program is part of the company's program and values in maintaining an appropriate work-life balance for its employees. For more information about S C Johnson, visit their website at: http://scjohnson.com.

IBM

On November 8, 2006, IBM's Richard Warrick presented to the COTS Mobile Workforce Workgroup meeting. In the 1990s, IBM's office space costs were the company's second largest expense (behind salaries). In order to reduce these costs, IBM invested over $1 billion in support of a mobile workforce. Currently over 115,000 IBM employees telecommute and 40% do not have dedicated office space.

The move to a mobile workforce has saved IBM $2 billion. This cost-savings, combined with productivity and talent increases makes IBM a best practice telecommuting organization.

The following best practices were identified in IBM's presentation:

Business Rules

- Remote workers must develop skills to stay connected.
- Organization must develop programs to address isolated feeling of some remote workers.
- Remote workers interact better after face-to-face meetings with other workers.
- Provide training on managing mobile workers.
- Telecommuting programs helps to attract and maintain talented employees from around the world.
- Are real estate costs an issue for the organization? Telecommuting can reduce these costs.

Technology Enablers

- Push everything possible to IBM's enterprise portal, w3 Employee Portal.
- Don't skimp on the portal. Spend as much time/resources as needed to develop the portal into a system that meets the needs of mobile workers.
- Portal includes comprehensive on-line support for mobile technology issues.

Program Measurement

- Provide documented, transparent set of clear business goals and objectives for employees.
- Business goals include clear performance targets that are easy to measure.
- Measure results – not when/where work is performed.
- Savings is measured in lower cost for office space.

For more information about IBM, visit their website at: http://www.ibm.com/us.

AT&T

"Point of View – The Remote Working Revolution" - This article is the fourth in a series of four thought leadership articles written by AT&T in cooperation with the Economist Intelligence Unit.

The following best practices were identified in the article:

Business Rules

- Remote working solutions must be planned carefully. The technology and HR issues must have been fully resolved or the solution will flounder.
- As groups become more dispersed, efforts need to be made to preserve a strong corporate identity, while more efficient monitoring of employee work targets becomes vital.
- Carry out an audit throughout the company to find out which jobs are suitable for remote working.

- HR, IT and facilities management need to be brought together to manage a remote working program effectively.
- Engage the support of managers.
- Consider offering to finance home office equipment and pay for monthly broadband charges.
- Ensure interaction between managers and remote workers is sustained and includes regular performance appraisals.

Technology Enablers

- Security in the form of VPN is recommended.

This article is available on the TELEWORK Consortium Web Site at http://www.teleworkconsortium.org/the_remote_working_revolution.pdf courtesy of AT&T.

VIACK Corporation

"A Guide to Teleworking – The Real Facts on Teleworking and How it Can Work for You"

"Implementing and Managing a Telework Program – A Complete Guide to Properly Managing Telework Employees"

VIACK Corporation (www.viack.com) is an authority on secure collaboration and communications over the Internet. The VIACK Corporation has published several white papers on Telework.

The following best practices were identified in the VIACK white papers:

Business Rules

- Decide if telework is appropriate. Telework is appropriate for work roles that involve 1) thinking and writing; 2) telephone-intensive tasks; and 3) computer-oriented tasks.
- If the program will have more than 10 employees, identify a Telework Coordinator.

- Establish a Telework Committee composed of representatives from human resources, legal, information technology and management and establish clear guidelines and policies.
- Train employees and managers.
- Determine who should telework - employees who are highly focused, self-sufficient, flexible, have great organization skills, and enjoy the solitude of working at home may be the most adaptable to teleworking.
- Stay informed of your teleworker's workload and status of projects by establishing a strong communications process.
- Manage teleworkers the same as other employees – they are not performing different work, just at a different location. Emphasize equality between teleworkers and non-teleworkers.
- Judge employee performance by results not by observation. Focus on results, such as accomplishments, products, or services provided. Performance plans should include standards that are measurable, observable, and at least verifiable. Quantity, quality, timeliness, and cost-effectiveness should be measured.

Technology Enablers

- Provide the appropriate technology support to allow employees to effectively work at home.
- Managers often fear having less control over employees who telework, and are concerned that productivity

and efficiency will suffer. This concern can be addressed by providing technology tools that support continuous communications, such as an online communications solution or collaboration tool suite.
- An online collaboration tool suite will allow teleworkers to better replicate in-person meetings and easily contribute to the discussion when joining meetings via the Internet, allow managers to see and hear teleworkers during online meetings, and enable managers and teleworkers to see who is available online for a meeting or a quick discussion.

Program Measurement

- Develop a program evaluation plan based on quantifiable program goals and objectives before the program is implemented.
- Evaluate the results of your telework program by considering whether it positively impacts productivity, operating costs, employee morale, recruitment and retention, as well as community concerns like traffic flow, air pollution, and mass transit use. For operating costs, measure sick leave taken, worker's compensation costs, office space needs, transit subsidy expenses.

These white papers are available on the TELEWORK Consortium Web Site (http://www.teleworkconsortium.org/viack_teleworking_guide%20110805.pdf and http://www.teleworkconsortium.org/viack_teleworking_mgnt_60.pdf) courtesy of VIACK.

The Telework Coalition

"Telework Benchmarking Study – Best Practices for Large-Scale Implementation in Public and Private Sector Organizations"

The Telework Coalition (TelCoa, www.TelCoa.org) is a non-profit membership organization dedicated to promoting virtual, mobile, and distributed work. In March 2006, TelCoa completed a benchmarking study of employers in both the public and private sectors with large telework programs.

According to their press release (http://www.telcoa.org/id310.htm), the employers examined in this study represent more than 500,000 employees and almost 150,000 teleworkers and mobile workers. The study looked at how these large organizations addressed and overcame obstacles and objections to create successful programs that benefit both the organization and its employees through reduced real estate costs, increased employee retention, and a much higher rate of employee satisfaction.

The following best practices were identified in the TelCoa study report, and are taken from the Executive Summary of the report:

Business Rules

- Even though telework programs were driven in part by a desire to increase workforce flexibility, the programs were generally developed and expanded outside of HR.

- The ability to work anywhere is becoming increasingly important. Where mobility was a key driver, the programs tended to be more unstructured.
- A small internal staff often administers an organization's telework program.
- All participating organizations had a "formal" telework program with written policies and procedures, and those with a large number of teleworkers cited the importance of a clear agreement between a manager and the employee.
- Resistance should be anticipated, but can be turned into support once the benefits are recognized.
- Most telework programs were voluntary, but all jobs and employees are generally considered suitable for telework.
- The amount of training believed necessary varies widely, and tended to be on-line when it was present.
- While originally driven by cost reduction, many organizations now view telework as an important component of their business continuity plan.

Technology Enablers

- Most of the participating organizations had a standard technology solution that included laptop computers, a Virtual Private Network (VPN), and extended help desk support.
- Many organizations are beginning to use Voice-over-Internet-Protocol (VoIP) to eliminate the need for a second phone line and reduce long-distance telephone charges, as well as file sharing and collaboration tools.

Program Measurement

- Program evaluation was an important part of most programs, but what was measured varied widely.
- Most organizations measured program participation, office space utilization, recruitment and retention, and/or the adequacy of training and supervisor support.

According to the TelCoa Benchmarking Study, the businesses involved in the study also reported a number of unintended consequences, including the following:

- Greater flexibility for staff to relocate to other business locations.
- Greater ability to maintain business continuity.
- Lower turn-over rates.
- Better staff performance.
- Access to a larger number of qualified applicants.
- Fewer layoffs for teleworkers than their office-based counterparts.

The Executive Summary of the report can be viewed at http://www.telcoa.org/id311.htm, and the complete report can be requested via email from info@TelCoa.org.

RESOURCE GUIDE

In addition to best practices, the Mobile Workforce Workgroup attempted to capture resources that were readily available to agencies developing or revamping a telework program. These resources cover a broad range of topics and are all accessible via the Web.

Category	Description	Resources
Expected Benefits	Sites which define expected benefits, costs and reasons for implementing telework.	http://www.commuterchallenge.org/costbenefit.html http://www.teleworkarizona.com/telefiles/program.htm http://www.teleworkarizona.com/telefiles/telework.htm
Teleworker Agreements	Sites which document telework agreements.	http://www.telcoa.org/id60.htm http://www.drcog.org/documents/Sample%20Teleworker%20Agreement.pdf http://www.teleworkarizona.com/Handbook/prototype.htm#Sample%20trial%20action%20plan http://www.virginia.gov/psg/resource/A129_FORMS22.html http://www.dhrm.virginia.gov/statefrm/wkagree1_61.pdf
Policies	Sites which document organization policies.	http://www.telework.gov/agencies.asp http://www.teleworkarizona.com/telefiles/policies.htm http://www.dhrm.state.va.us/hrpolicy/policy/telecommute1_61.pdf.
Training	Sites which document training requirements and courses.	http://www.telework.gov/courses/index.html http://www.capps.wsu.edu/telework/ http://www.teleworkcollaborative.com/pages/kits.htm
FAQs	Sites which document Frequently-Asked-Questions.	http://www.commuterchallenge.org/cc/tel_faq.html http://www.telework.gov/faqs.asp http://www.teleworkarizona.com/telefiles/qa.htm http://www.teleworkarizona.com/telefiles/myths.htm
Work Guidelines	Sites which document guidelines for telework arrangements.	http://www.telcoa.org/id53.htm http://www.telcoa.org/id57.htm http://www.telcoa.org/id58.htm http://www.commuterchallenge.org/cc/tel_ready.html http://www.teleworkarizona.com/telefiles/selectin.htm

Security	Sites which document security requirements and capabilities.	http://csrc.nist.gov/publications/nistpubs/800-46/sp800-46.pdf
Handbooks	Sites which document handbooks and manuals.	http://www.rideshareinfo.org/pdf/Telework%20Portfolio.pdf http://www.teleworkarizona.com/Handbook/prototype.htm
Home safety	Sites which document home safety requirements and checklists.	http://www.telcoa.org/id59.htm http://www.dhrm.virginia.gov/statefrm/telecommutingchecklist.doc www.dhrm.virginia.gov/statefrm/checklist1_61.pdf
Technology	Sites which document technology issues, guidelines and recommendations.	http://csrc.nist.gov/publications/nistpubs/800-46/sp800-46.pdf
Newsletters	Sites which document organization newsletters.	http://www.teleworkexchange.com/teleworker-11-06.asp
Recommended Resources	Sites which are considered to be excellent resources for multiple purposes.	http://www.telework.gov/index.asp http://www.teleworkexchange.com/default.asp http://www.teleworkcollaborative.com/ http://www.teleworkcollaborative.com/pages/guide.htm
Evaluations	Sites which document evaluations and evaluation tools.	http://www.teleworkarizona.com/telefiles/evalsum.htm

"Strategies for leveraging best practices to promote increased use of telework in Virginia ."

RECOMMENDATIONS

The purpose of the Mobile Workforce Workgroup was to develop a summary of best practices that would enable state government managers to design and develop effective telework programs. During the course of our work, it became apparent that best practices consistently emphasize policy development, program design, enabling technology, and program measurement. The following recommendations surfaced as potential strategies for leveraging best practices to promote increased use of telework in Virginia government. A number of the recommendations involve taking an enterprise approach to implementing and promoting telework.

Business Rules

1. The Department of Human Resource Management (DHRM), in conjunction with the Office of Telework Promotion and Broadband Assistance, should develop training programs:
    - for supervisors and mid-level managers on new management and evaluation strategies required by telework programs and
    - for employees on maintaining communication with managers and co-workers, IT operations and maintenance, information security, and threat vulnerability.[4]

2. DHRM should revise the Commonwealth's Telework Policy to incorporate best practices and further promote a standard approach to telework. The policy should continue to allow agencies the flexibility to address agency-specific business requirements where necessary, but should seek to limit time spent on program design by encouraging standard approaches based on best practices. The policy should include a list of job functions that are generally not considered appropriate for remote work. All other work should be considered appropriate for telework and should be used as the standard against which agency participation is measured.

3. Telework in Virginia government should be viewed as revenue-neutral – any savings generated, at least initially, should be directed back into the telework program to fund tools, training, and opportunities for employee interaction that will result in ongoing increased usage of telework. This may occur at either the agency or Commonwealth level.

---

[4] The Center for Digital Government, a division of e.Republic, Inc., "Telework 360 - A Best Practices Digest and Guide to Getting Telework Right in the Public Sector" (2006), p 12.

4.   The Office of Commonwealth Preparedness, in conjunction with the Commonwealth CIO and the Office of Telework Promotion and Broadband Assistance, should require that all personnel deemed essential to the ongoing administration of state government and whose job role is suitable for teleworking, be equipped to carry out their responsibilities away from their normal workplace. In addition, these persons should be required to work remotely on a periodic basis to ensure that they are prepared to function effectively in the event of a disaster.

5.   The Department of General Services (DGS) should work with agencies in evaluating the potential for and developing tactics to reduce facilities costs as a result of smaller on-site workforces resulting from telework programs. In addition, DGS should identify conference rooms, meeting rooms, and available office space within existing state facilities that can be used as needed by mobile workers, promoting an enterprise approach to facilities utilization. Occupants of state facilities across the Commonwealth should identify the meeting space available at those facilities, and that information should be used to populate a statewide online facility reservation tool. For any facilities that are refurbished and all new construction, DGS should provide guidance to ensure conference and meeting space is available to mobile workers from all agencies when practical and appropriate.

6.   The Office of Telework Promotion and Broadband Assistance should create a telework advisory committee composed of telework coordinators and other interested individuals from agencies, higher education, and local governments to meet, share ideas and generally promote telework within the Commonwealth.

Technology Enablers

7.   The Commonwealth CIO should provide standard technology enablers for remote work programs. This "catalogue" of technologies will provide for a secure environment while enabling an employee to function away from the office with minimal additional expense. The CIO should assist agencies in determining which technology offerings are appropriate given their environment and the work that will be done remotely, and assist agencies in implementing any necessary technology upgrades.

8.   The Commonwealth CIO, in conjunction with the Office of Telework Promotion and Broadband Assistance and the Department of Human Resources, should develop an enterprise collaboration toolset for supporting remote workers, including a remote work knowledge repository, corporate instant messaging, a facility reservation application that provides ready access to temporary office space and meeting facilities, an online employee performance system, etc. The state should consider a

public-private partnership for the development of this toolset whereby savings from reduced office space needs could be used to fund ongoing development and enhancement of the collaboration portal.

9. The Commonwealth CIO should ensure a statewide approach for supporting all VITA telework customers that provides for minimal loss of productivity from equipment failures and required periodic hardware/software installs/upgrades, and makes telephone support readily available.

10. The Commonwealth CIO, in conjunction with the Office of Telework Promotion and Broadband Assistance, should utilize existing VITA Customer Councils and Agency IT Resources (AITRs) to provide input on telework tools and technologies.

Program Measurement

11. DHRM should create, in conjunction with the Office of Telework Promotion and Broadband Assistance, a dashboard for measuring performance of remote work programs. DHRM should work with agencies to determine what information should be collected and reported at the agency level. At a minimum, measures should include percent of staff in positions appropriate for remote work that actually work remotely, days of work performed remotely, reductions in office space, employee satisfaction survey results, and reduction in commuter miles traveled. To the extent possible, include any quantifiable employee or agency productivity increases. Telework measures should be included in agency head performance measures.

12. The Department of Human Resource Management (DHRM) should continue to advance the employee performance planning and evaluation process to actively promote the importance of outcome-based measures regardless of where the work is being done.

ACTIVITIES OF OTHER VIRGINIA GROUPS FOCUSED ON TELEWORK

DEPARTMENTS, COMMITTEES, AND WORKGROUPS

JCOTS Telecommute and Telework Advisory Committee
Legislative Members: Senator Wampler, Delegate Plum; Staff: Lisa Wallmeyer

This citizen committee was formed by JCOTS due to the referral of HB 1240 (2006). Following is a summary of HB 1240 taken from the JCOTS 2006 work plan:

"Secretary of Administration; telecommuting and alternative work schedules for state employees; effectiveness. Provides that the Secretary of Administration, in cooperation with the Secretary of Technology and in consultation with the Council on Technology Services, shall measure the effectiveness of the comprehensive statewide telecommuting and alternative work schedule policy. The bill provides that the head of each agency shall report annually to the Secretary on the status of any programs or policies developed and implemented pursuant to this section. Any agency head failing to comply with the requirements of this section shall forfeit 1% of the moneys appropriated for the operation of the agency as provided in the appropriation act. The Secretary shall so notify the Comptroller, who shall take such moneys and deposit them into the Literary Fund. The bill also requires the Department of Human Resource Management to notify state employees by email or other method deemed appropriate by the Department of the statewide telecommuting and alternative work schedule policy."

Deliverable content and schedules have not yet been identified. More information on the work of this committee and presentations made before it can be found at:
http://jcots.state.va.us/metcalmat.htm.

Joint Subcommittee - Telework Opportunities for State and Private Sector Employees
Delegate Timothy D. Hugo, Chairman and Senator Jeannemarie Devolites Davis, Vice-Chairman.

HJR 144 2006: From the enabling legislation, this committee's purpose is to:
"study the ways in which telework opportunities for state and private sector employees can be enhanced and increased." Specifically the committee will: "…(i) identify state agencies whose operations are most conducive to telework, (ii) recommend fiscal and other incentives necessary

to increase telework, and (iii) examine the impact of increased telework opportunities on the continuity of government operations in the event of natural or manmade disasters. The joint subcommittee shall also make recommendations on the appropriateness and feasibility of a pilot telework program involving one or more state agencies." Also, "…the chairman shall submit to the Division of Legislative Automated Systems an executive summary of its findings and recommendations no later than the first day of the next Regular Session of the General Assembly for each year. Each executive summary shall state whether the joint subcommittee intends to submit to the General Assembly and the Governor a report of its findings and recommendations for publication as a House or Senate document."

More information on the work of this committee and presentations made before it can be found at: http://dls.state.va.us/pubs/legisrec/2006/welcome.htm.

Office of Telework Promotion and Broadband Assistance
Karen Jackson, Director

The Office of Telework Promotion and Broadband Assistance within the Office of the Secretary of Technology was created by Governor Timothy Kaine on September 12, 2006 with Executive Order 35. The Office consists of a director appointed by the Secretary of Technology and additional professionals as the Secretary shall determine.

The director shall have the following duties (among others):

- Promote and encourage use of telework alternatives for public and private employees, including but not limited to, appropriate policy and legislative initiatives.

- Coordinate activities regarding telework with, and regularly report to, a board consisting of the Secretaries of Administration, Commerce and Trade, Finance, Technology and Transportation. The Secretary of Technology shall serve as chair of the board. Additional members may be designated by the Governor. Staff support to this group shall be provided by the offices of the Secretaries of Technology and Transportation.

Additional information can be found at:
http://www.governor.virginia.gov/Initiatives/ExecutiveOrders/2006/EO_35.cfm.

Office of Commonwealth Preparedness
Robert P. Crouch, Jr., Assistant to the Governor for Commonwealth Preparedness

The Office of Commonwealth Preparedness was created in the Office of the Governor to work with and through others -- including federal, state, and local officials, as well as the private sector -- to develop a seamless, coordinated security and preparedness strategy and implementation plan. The office also serves as the liaison between the Governor and the federal Department of Homeland Security.

Duties of this office include:

- Oversight, coordination, and review of all disaster, emergency management, and terrorism management plans for the state and its agencies;
- Serve as the Governor's representative on regional efforts to develop a coordinated security and preparedness strategy, including the National Capital Region security group organized as part of the federal Urban Areas Security Initiative;
- Serve as a direct liaison between the Governor and local governments and first responders on issues of emergency prevention, preparedness, response, and recovery;
- Educating the public on homeland security and overall preparedness issues.

Additional information can be found at: http://www.commonwealthpreparedness.virginia.gov/

VITA Telework Strategy and Advisory Committee
Mike Hammel, Chair

This committee is focused primarily with maintaining the policy, procedures and technologies needed to promote an effective Telework program at VITA. The committee is in the process of reviewing the current VITA policies and forms along with developing a User's Guide and FAQ for new teleworkers. It will also focus on identifying existing resources useful to teleworkers and their managers. Eventually it is hoped that, based on the experiences with Telework within VITA, the group can help with the expansion of teleworking to other in-scope agencies. This committee is currently chartered through the end of 2007.

Department of Human Resource Management
Sara Wilson, Director

DHRM is responsible to the Secretary of Administration for developing Telework and Telecommuting policies to be used by all Executive Branch Agencies in developing their own agency specific policies. Additional information on DHRM's telecommuting policy can be found at: http://www.dhrm.state.va.us/hrpolicy/policy/telecommute1_61.pdf.

Department of Rail and Public Transportation
Gus Robey and Rick Clawson

DRPT is actively involved with promoting teleworking in the private sector. They offer financial incentives to employers beginning or expanding telework programs. They have developed a web site with resource links and useful information to help an employer get started with teleworking. In the fall of 2006 they will launch a new web site with additional resources and custom developed training packages, available for public use at no charge. The courses will focus on how to be a better teleworker and how to be a better manager of teleworkers. Click here to access Telework!VA.

INFORMAL COMMITTEES

VITA Pandemic Preparedness Committee
Barbara Vaughn, Chair (Enterprise Security & VITA Risk Management)

This committee is charged with ensuring that VITA is suitably prepared in the event of a pandemic flu outbreak. Teleworking is identified as a major part of this important COOP initiative.

Interagency Telework committee
Gus Robey, Chair (Dept. of Rail and Public Transportation)

This is an informal committee made up of representatives from VITA, DRPT and DHRM. The group members consult with each other to promote and advance teleworking in the public and private sectors. There is no specific agenda or work plan in place at this time.